

OFFICE OF THE RECORDS MANAGEMENT AND
DISTRIBUTION BRANCH FOR THE FISCAL YEAR, 1954

RETURN TO
RECORDS MANAGEMENT
BRANCH FOR SERVICE

1. THE RECORDS MANAGEMENT TRAINING PROGRAM WILL BE EXPANDED TO INCLUDE THE FOLLOWING FUNCTIONS WHICH ARE GENERALLY CONSIDERED TO CONSTITUTE A COMPLETE PROGRAM.
 - a. Several inquiries regarding the Records Management Training Course given in April and May, indicate a need to repeat it.
 - b. Special classes in the more technical phases of records management; such as forms design, reports management, and the writing of disposition schedules, are planned for Area Records Officers.
 - c. Training at American University is being requested for two records analysts assigned to the Records Center, who will form the nucleus of a staff to train other Records Center personnel and Area Records Officers in the preparation of records disposition schedules. Additional analysts will be recommended for special training at local educational institutions or elsewhere as appropriate.
 - d. Training in records management work for Area Records Officers is also contemplated at local universities and the allocation of the necessary funds from the Office of Training budget for the coming year has been requested.
 - e. The training bulletins covering guides for accomplishing various projects will be continued.
 - f. On-the-job training of Area Records Officers by Records Management and Distribution Branch personnel will be continued as each new project is undertaken.
2. THE PRESENT FORMS MANAGEMENT PROGRAM WILL BE EXPANDED TO INCLUDE THE ADDITIONAL FUNCTIONS WHICH ARE GENERALLY CONSIDERED TO CONSTITUTE A COMPLETE PROGRAM.

Objectives of the program:

- a. Establishment of over-all forms management requirements including the establishment of objectives for varying organizational levels and the standards to be met.
- b. Establish the duties of the Area Records Officers in connection with the forms program.
- c. Training the Area Records Officers in the techniques of forms management. Prepare and issue to Area Records Officers, a handbook covering standards and guides for the development and control of forms.

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- c. Through surveys of all forms used by particular offices and by analysis of new and old forms being ordered, assure: (1) that the forms are needed and that they are designed to fulfill the need in the most efficient and economical manner; (2) that a reduction in the number of forms by the consolidation or standardization of needed forms and by the elimination of obsolete or ineffective forms; and (3) that the forms are reproduced and distributed as economically as possible.
- e. Establish and maintain an indexing and control system by the use of punch card methods.

3. A CORRESPONDENCE MANAGEMENT PROGRAM WILL BE UNDERTAKEN.

- a. There is at present an Agency Style Manual limited to style and format standards.
- b. Under the expanded program, a handbook will be developed which will incorporate -
 - (1) Guides and techniques for typists.
 - (2) Style and format standards (but more complete and better organized than the present Manual)
 - (3) Guides and standards for correspondents, including the use of pattern paragraphs and form letters.
- c. In addition to the issuance of guides and standards, there will be a continuing survey of correspondence problems and post audits (reviews) of completed correspondence to determine problem areas with respect to failures in applying the standards and determining needed improvements in the standards.

4. A REPORTS MANAGEMENT PROGRAM (ADMINISTRATIVE REPORTS) WILL BE UNDERTAKEN.

- a. Standards and guides will be developed in conformance with management requirements, including the establishment of objectives for varying organizational levels.
- b. The results to be obtained from the program are:
 - (1) Elimination of unnecessary or duplicate reporting.
 - (2) Insurance that instructions, forms, and procedures for necessary reporting are clear and complete, and that they provide the most simple and direct methods of reporting.
 - (3) Insurance that required reports provide adequate data for intended purposes, and that proper reporting intervals are established.

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(4) Provision of central reference points for information regarding reports.

5. THE RECORDS SYSTEMS PROGRAM WILL BE EXPANDED AND ACCELERATED.

Standards and guides will be developed for issuance in handbook form to cover the following subjects:

- a. Receiving, recording, controlling, routing and dispatching communications.
- b. File organization and location of official records.
- c. Agency filing system (now issued in handbook form for concurrence of all offices)
- d. Standardization of supplies and equipment
- e. Selection, reproduction and transfer of vital materials to the Repository.
- f. Microfilm standards and guides.

6. RECORD SURVEYS WILL BE CONTINUED.

A limited staff of records analysts will be assigned to make spot surveys throughout the Agency to determine the effectiveness of the Area Records Officers in conducting their programs and to assist them in the advancement of their programs. Specific surveys are planned in Personnel, OSI, OO and ORR.

7. RECORDS DISPOSITION PROGRAM WILL BE EXPANDED AND ACCELERATED.

- a. In accordance with General Service Administration regulations, each Federal agency must complete preparation of disposition schedules on all records by 30 June 1954. The Records Management and Distribution Branch staff will work closely with the Area Records Officers to accomplish this objective.
- b. Guide instructions for the preparation of disposition schedules will be issued in handbook form.
- c. Controls are being developed to facilitate and coordinate records disposition and to insure conformance with the policies and procedures of the Records Disposition Program.

8. ESTABLISH ADEQUATE AGENCY RECORDS CENTER FACILITIES.

- a. Upon approval of the staff study currently under consideration, an adequate Agency Records Center will be placed in operation.

- b. Approximately 6 additional slots will be recommended for the Records Center T/O to operate in the first year of the expanded program.
- c. Training in preparation of disposition schedules will be given to Records Center personnel to permit development of controls for the large volume of inactive record material to be received.
- d. The supplemental distribution function is placed organizationally under the Records Center. The volume of new material received in the last six months was 76% greater than the first six months of the year, while the number of requests for material increased by 51%. In spite of improvements in procedure, it will be necessary to increase the personnel assigned to this function by two, in order to continue prompt service.

9. IMPROVED COURIER SERVICE AND FACILITIES.

- a. Continuing surveys of courier and mail facilities and operations will be made to assure the best service possible.
- b. With the Agency's acquisition of the buildings on Independence Avenue, it will be necessary to add 3 messenger positions to the current T/O in order to service them. However, no increase in the courier staff or the number of vehicles required is anticipated in the coming year.

10. INCREASE IN PERSONNEL CEILING TO BE REQUESTED.

In order to conduct the expanded Records Management Program, the following increase in personnel is being recommended:

Records analysts staff	2
Records Center staff	6
Supplemental Distribution	2
Mail Control	<u>2</u>
Total	12

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